

钢铁产业调整和振兴规划

A Blueprint for Steel Industry Adjustment and Revitalization

钢铁产业是国民经济的重要支柱产业，涉及面广、产业关联度高、消费拉动大，在经济建设、社会发展、财政税收、国防建设以及稳定就业等方面发挥着重要作用。

Steel industry is an important mainstay industry for national economy, which is widely influenced to the whole society, highly interrelated between industries, and significantly stimulated the consumption, and plays a crucial role in the economy, social development, finance and taxation, national defense construction and employment stability.

为应对国际金融危机的影响，落实党中央、国务院保增长、扩内需、调结构的总体要求，确保钢铁产业平稳运行，加快结构调整，推动产业升级，特编制本规划，作为钢铁产业综合性应对措施的行动方案。规划期为 2009—2011 年。

To cope with the impact of international financial crisis on the national economy, materialize the general principle by the State Council of stabilizing growth, enhancing domestic demands and adjusting the structure, ensure stable operation of steel industry, accelerate structural adjustment, and facilitate industrial upgrading, this blueprint is hereby formulated as an comprehensive action plan of measures for the steel industry to deal with the current situation, which is valid from 2009 to 2011.

一、钢铁产业现状及面临的形势

I. Current Situation of Steel Industry

我国是钢铁生产和消费大国，粗钢产量连续 13 年居世界第一。进入 21 世纪以来，我国钢铁产业快速发展，粗钢产量年均增长 21.1%。2008 年，粗钢产量达到 5 亿吨，占全球产量的 38%，国内粗钢表观消费量 4.53 亿吨，直接出口折合粗钢 6000 万吨，占世界钢铁贸易量的 15%。2007 年，规模以上钢铁企业完成工业增加值 9936 亿元，占全国 GDP 的 4%，实现利润 2436 亿元，占工业企业利润总额的 9%，直接从事钢铁生产的就业人数 358 万。钢铁产品基本满足国内需要，部分关键品种达到国际先进水平。钢铁产业有力支撑和带动了相关产业的发展，促进了社会就业，对保障国民经济又好又快发展做出了重要贡献。

China is a large country in steel production and consumption, and the production of crude steel has been ranking the 1st place in the recent consecutive 13 years in the world. Since the beginning of 21st century, the steel industry in China has witnessed rapid growth, and crude steel production has increased at an annual rate of 21.1%. In 2008, the production of crude steel has reached 500 million metric tons, standing for 38% of the global production, the domestic apparent consumption of crude steel was 453 million metric tons, and direct exportation converted into 60 million metric tons of crude steel, standing for

15% of world steel trade. In 2007, steel enterprises above the scale contribute 99.36 billion CNY of industrial added value, standing for 4% of national GDP, realize 24.36 billion CNY of profits, standing for 9% of total profits of industrial enterprises, and the employment directly related to steel production are about 3.58 million. The steel products could generally satisfy the domestic demands, and part of the key specifications could reach the international advanced level. The steel industry firmly supports and motivates the development of related industries, promotes social employment and safeguards and contributes the sustainable and rapid development of national economy.

但是, 钢铁产业长期粗放发展积累的矛盾日益突出。一是盲目投资严重, 产能总量过剩。截至 2008 年底, 我国粗钢产能超出实际需求约 1 亿吨。二是创新能力不强, 先进生产技术、高端产品研发和应用还主要依靠引进和模仿, 一些高档关键品种钢材仍靠大量进口, 消费结构处于中低档水平。三是产业布局不合理, 大部分钢铁企业分布在内陆地区的大中型城市, 受到环境容量、水资源、运输条件、能源供应等因素的严重制约。四是产业集中度低, 粗钢生产企业平均规模不足 100 万吨, 排名前 5 位的企业钢产量仅占全国总量的 28.5%。五是资源控制力弱, 国内铁矿资源禀赋低, 自给率不足 50%。六是流通秩序混乱。钢铁产品经销商超过 15 万家, 投机经营倾向较重。

However, the problems of the steel industry, which have been accumulated during the extensive development in the past, have been more troublesome than ever. (1) Blind investment based on misperception of market demands and overexpansion of aggregate capacity. Until the end of 2008, the production capacity of crude steel exceeds the actual demands for about 100 million metric tons. (2) Weak in innovation. The research and development and application of advanced production technology and high-end products are mainly relied on importation and imitation. Some of the superior quality and key steel products still request numerous import while the structure of consumption maintains at a low level. (3) Poor geographical location of production capacities. Most production facilities and steel enterprises are located in large and medium-sized inland cities, where production are poorly conditioned and seriously restricted in the terms of environmental absorbing capacity, water resource, transportation and energy supplies. (4) Low concentration rate. The average production capacity of crude steel is less than 1 million metric tons. Top 5 producers account only 28% of total production nationwide. (5) Weak in resource reserve. Domestic endowment of iron ore resource is low and the degree of self-sufficiency is less than 50%. (6) Disorder in circulation markets. More than 150,000 vendors are in the steel market. There is serious tendency to speculate on the markets.

2008 年下半年以来, 随着国际金融危机的扩散和蔓延, 我国钢铁产业受到严重冲击, 出现了产需陡势下滑、价格急剧下跌、企业经营困难、全行业亏损的局面, 钢铁产业稳定发展面临着前所未有的挑战。应当看到, 钢铁产业在经历了长期粗放型扩张后, 必然要进行一次大的调整。现阶段, 我国城镇化、工业化任务依然繁重, 内需潜力巨大, 钢铁产业发展的基本面没有改变。必须抓住历史机遇, 制定实施钢铁产业结构调整 and 振兴规划, 促进钢铁产业平稳运行、健康发展。

Since the second half of 2008, along with spill-over and spreading of the effect of financial crisis, the steel industry has been seriously hit, production and demand are

sharply decreasing, market prices are speedily falling, businesses are in trouble and all producers are making losses. Stable development in the steel industry has encountered unprecedented challenges. It should be noted that, after long-term extensive expansion in the past, the steel industry has to enter into a substantial adjustment. However, at present stage of economic development, urbanization and industrialization China are still in their process of deepening and far from completion, domestic demand is huge in volume, the basis of the steel industry development in China remain unchanged. It is therefore a must to grasp the opportunity to formulate and implement a plan for structural adjustment and revitalization of the steel industry, and thereby facilitate stable operation and healthy development of the industry.

二、指导思想、基本原则及目标

II. Guiding Concept, Basic Principle & Objective

(一) 指导思想。

A. Guiding Concept

全面贯彻党的十七大精神，以邓小平理论和“三个代表”重要思想为指导，深入贯彻落实科学发展观，按照保增长、扩内需、调结构的总体要求，统筹国内外两个市场，以控制总量、淘汰落后、企业重组、技术改造、优化布局为重点，着力推动钢铁产业结构调整和优化升级，切实增强企业素质和国际竞争力，加快钢铁产业由大到强的转变。

It shall comprehensively implement the policy recommendation of the 17th Congress of the CCP, under the guidance of the Deng Theory and "Three Interests" ideology, in the light of the scientific development perspective, according to the general requests of sustaining economic growth, expanding domestic demands, and adjusting structure, plan the domestic and foreign markets as a whole, focus on general scale control, backwards elimination, enterprises reconstruction, technology innovation, and allocation optimization, exert to promote the steel industry structural adjustment and optimizing upgrade

(二) 基本原则。

B. Principles

1. 应对危机与振兴产业相结合。立足当前，着眼长远，既要着力解决钢铁产业当前面临的主要困难，保先进生产力，保重点骨干企业，保关键品种，保市场稳定，促进产业平稳发展，又要利用市场倒逼机制，充分利用各种有利因素，加快钢铁产业结构优化升级，不断增强产业发展后劲。

1. Face up the crises and revitalize the industry

Current difficulties facing the steel industry should be addressed with the remedial measures to safeguard the advanced productivity, and to stabilize the markets, structural adjustment in the steel sectors should also be attended to take advantage of the current market conditions in dismantling the backward productivity.

2. 控制总量与优化布局相结合。按照沿海、沿江、内陆科学合理布局和与资源环境相适应的要求, 结合淘汰落后、企业重组和城市钢厂搬迁, 在控制总量的前提下, 调整优化产业布局。

2. Optimize geographical location in the wave of macro-economic adjustment

Optimize industrial location in the steel sectors under the condition of standstill of total capacity nationwide, in various optional ways, such as dismantling backward capacity, re-organization, rational re-location to coastal/riverside/inland sites to better fit to environment and resources constraints.

3. 自主创新与技术改造相结合。培育企业原始创新、集成创新和引进消化吸收再创新能力, 着力突破制约产业转型升级的关键技术, 加大技术改造力度, 提高工艺装备水平, 提升产品档次和质量。

3. Technology innovation and invention

Promote capacity building of original and integrated inventions, and re-invention based on current technologies, with a focus on those as bottleneck for transformation and upgrading of the industry, in forms of enhancing technical renovation, level of equipments and product quality.

4. 企业重组与体制创新相结合。通过体制创新, 努力消除影响企业重组的财税利益分配、资产划拨、债务核定和处置等体制性障碍, 为推动钢铁企业集团化发展和实现跨地区、跨所有制、跨行业的兼并重组创造良好的环境。

4. Reorganization and institutional invention

Abolish institutional barriers in regard to re-distribution of fiscal income, referral of assets, evaluation and settlement of debt by means of institutional invention, and thereby facilitate reorganization and re-grouping of steel mills in a scale and scope of inter-region, inter-ownership and inter-sector.

5. 内需为主与全球配置相结合。坚持充分利用两个市场、两种资源, 以满足国内市场需求为主, 优化直接出口, 扩大间接出口, 在努力加强地质勘查和合理开发利用国内铁矿资源的同时, 抓住机遇, 积极实施“走出去”战略。

5. Domestic demand and global balance

Continue to make best use of the two markets, i.e. domestic and international, and resources therein, producers should prioritize domestic market, and rationalize direct export and enlarge indirect export, actively implement the strategy of going global, and take advantage of the current situation in the global market in the meantime to enhance exploitation of domestic iron ore mines.

(三) 规划目标。

C. Targets

力争在 2009 年遏制钢铁产业下滑势头, 保持总体稳定。到 2011 年, 钢铁产业粗放发展方式得到明显转变, 技术水平、创新能力再上新台阶, 综合竞争力显著提高, 支柱产业地位得到巩固和加强, 步入良性发展的轨道。

The downturn trend in the steel industry should be halted and stability in totality restored. The extensive development in the steel industry be substantially left down before 2011, and technology level and invention capacity be remarkably enhanced, competitiveness raised, and the status of steel industry as a pillar of the economy be strengthened, and the industry as a whole be on a healthy path.

1. 总量恢复到合理水平。2009 年我国粗钢产量 4.6 亿吨, 同比下降 8%; 表观消费量维持在 4.3 亿吨左右, 同比下降 5%。到 2011 年, 粗钢产量 5 亿吨左右, 表观消费量 4.5 亿吨左右, 工业增加值占 GDP 的比重维持在 4% 的水平。

1. A reasonable level of production restored.

Crude steel production is to be restored at 460 million metric tons in 2009, 8% lower than the same period last year.

2. 淘汰落后产能有新突破。按期淘汰 300 立方米及以下高炉产能和 20 吨及以下转炉、电炉产能。提高淘汰落后产能的标准, 力争三年内再淘汰落后炼铁能力 7200 万吨、炼钢能力 2500 万吨。

2. A new breakthrough in dismantling the backward capacities is expected.

Dismantle production capacity of blast furnace with unit capacity of 300 cubic meters or less and those of converter and electric furnace with unit capacity of 20 metric tons or less. Raise the standards of backward capacities, and strive to further dismantle, within 3 years, backward capacity of 72 million metric tons in iron-making and those of 25 million metric tons in steel-smelting.

3. 联合重组取得重大进展。形成若干个具有较强自主创新能力和国际竞争力的特大型企业, 国内排名前 5 位钢铁企业的产能占全国产能的比例达到 45% 以上, 沿海沿江钢铁企业产能占全国产能的比例达到 40% 以上, 产业布局明显优化, 重点中心城市钢铁企业污染明显减少。

3. Significant progress concerning reorganization and integration

Some super large enterprises emerged which are stronger in self-innovation of technologies and in competitive edge in the international market, the capacity of top 5 steel producers occupy 45% of national total, and the capacity located along the rivers or in the coastal areas account for 40% or more of the national total, industrial location remarkably optimized and pollution by steel makers in key centre cities substantially decreased.

4. 技术进步得到较大提升。加强技术改造, 加快技术进步, 降低生产成本, 提高产品质量, 优化品种结构。重点大中型钢铁企业 60% 以上产品实物质量达到国际先进水平, 百万千瓦火电及核电用特厚钢板和高压锅炉管、25 万千瓦安以上变压器用高磁感低铁损取向硅钢等产品生产实现自主化, 关键钢材品种自给率达到 90% 以上, 400MPa 及以上热轧带肋钢筋使用比例达到 60% 以上。

4. Technical progress remarkably enhanced

For those large and medium enterprises, quality of 60% products should reach the advanced level of physical standard worldwide, production capacity for some particular products should be established.

5. 自主创新能力进一步增强。

5. Self invention capacity further strengthened

通过引进消化吸收和创新, 提高技术装备水平, 一般装备基本实现本地化、自主化, 大型装备本地化率 92% 以上, 力争在关键工艺技术、节能减排技术, 以及高端产品研发、生产和应用技术等方面取得新突破。

Capacity to make general equipment production and some large facilities should be realized, some breakthrough in regard to R&D of high-end products, production and applied technologies are expected.

6. 节能减排取得明显成效。

6. Remarkable breakthrough in relation to energy-saving and emission reduction should be made

重点大中型企业吨钢综合能耗不超过 620 千克标准煤, 吨钢耗用新水量低于 5 吨, 吨钢粉尘排放量低于 1.0 千克, 吨钢二氧化硫排放量低于 1.8 千克, 二次能源基本实现 100% 回收利用, 冶金渣近 100% 综合利用, 污染物排放浓度和排放总量双达标。

Remarkable breakthrough in relation to energy-saving and emission reduction in some special areas/processes should be made by the key large and medium enterprises.

三、产业调整和振兴的重点任务

III. Main perspective achievements in industrial adjustment and revitalization

按照上述指导思想、基本原则和规划目标, 当前和今后一个时期, 要着力做好以下八个方面工作。

In spirit of the guiding concept, principles and targets above, the following main perspective achievements could be pursued. (elaborations in respect to achievements expected are made in the following aspects)

(一) 保持国内市场稳定, 改善出口环境。

1. Stabilize domestic market and improve climate for export

积极落实国家扩大内需措施, 稳定建筑用钢市场, 保障重点工程用钢。通过调整和振兴相关产业, 努力稳定和扩大汽车、造船、装备制造等产业需求, 以及保障性住房等房地产建设、新农村建设、地震灾后重建和公路、铁路、机场等重大基础设施建设的用钢需求。建筑用钢占国内消费量的比重稳定在 50% 左右。

Actively implement the measure concerning enlargement of domestic demands, stabilize the steel market for construction, and safeguard the supply of steel for key projects. According to adjust and revive the relevant industries, stabilize and enlarge the

demands of automotive, shipbuilding, and equipment manufacturing industries, and the steel demands from real estate construction, new rural area development, reconstruction for the post-earthquake and key infrastructure construction like road, railway and airport. The steel consumption for construction shall be stabilized at 50% of the total domestic steel consumption.

改善钢铁产品进出口环境, 实施适度灵活的出口税收政策, 稳定国际市场份额, 鼓励钢材间接出口。组织协会和企业积极应对反倾销、反补贴等贸易摩擦, 争取良好的国际贸易环境。

Improve the import and export environment of steel products, implement appropriate and facile export tax policy, stabilize international market share, and encourage indirect steel export. Organize the relevant associations and enterprises to handle trade remedy disputes like anti-dumping and countervailing, and struggle for a good international trade environment.

(二) 严格控制钢铁总量, 加快淘汰落后。

2. Speed up dismantling backward capacity while strictly keeping the total standstill

严格控制新增产能, 不再核准和支持单纯新建、扩建产能的钢铁项目, 所有项目必须以淘汰落后为前提, 2010年年底前, 淘汰300立方米及以下高炉产能5340万吨, 20吨及以下转炉、电炉产能320万吨; 2011年底前再淘汰400立方米及以下高炉、30吨及以下转炉和电炉, 相应淘汰落后炼铁能力7200万吨、炼钢能力2500万吨。实施淘汰落后, 建设钢铁大厂的地区和其它有条件的地区, 要将淘汰落后产能标准提高到1000立方米以下高炉及相应的炼钢产能。

Strictly control the new facilities, not approve and support simply new and expansion of steel facilities of steel projects, and all the projects shall be at the premise of dismantling backwards capacity. Before the end of 2010, it shall dismantle 53.4 million MT capacity of blast furnace whose scale is 300 cubic meters or less, 3.2 million MT capacity of transfer furnace and electric furnace whose scale is 20 MT or less. Before the end of 2011, it shall further dismantle the blast furnace whose scale is 400 cubic meters or less and transfer furnace and electric furnace whose scale is 30 MT or less, and the elimination of backward iron making capacity shall be 72 million MT and that of steel making capacity shall be 25 million MT. The areas who implement the dismantling of backward capacity, construction of large steel enterprises and other areas which have proper conditions, shall enhance the standard of elimination backward blast furnace capacity to 1000 cubic meters or less and equivalent steel making capacity.

(三) 促进企业重组, 提高产业集中度。

3. Increase concentration ratio in the industry and enhance reorganization

进一步发挥宝钢、鞍本、武钢等大型企业集团的带动作用, 推动鞍本集团、广东钢铁集团、广西钢铁集团、河北钢铁集团和山东钢铁集团完成集团内产供销、人财物统一管理的实质性重组; 推进鞍本与攀钢、东北特钢, 宝钢与包钢、宁波钢铁等跨地区的重组, 推进天津钢管与天铁、天钢、天津冶金公司, 太钢与省内钢铁企业

等区域内的重组。力争到 2011 年, 全国形成宝钢集团、鞍本集团、武钢集团等几个产能在 5000 万吨以上、具有较强国际竞争力的特大型钢铁企业; 形成若干个产能在 1000~3000 万吨级的大型钢铁企业。

It shall further exert the leading role of large enterprise groups like Baosteel, Anben Steel and WISCO etc., promote the internal substantial reconstruction concerning supply and sales, and integrated management of human resources, capitals and assets in Anben group, Guangdong steel group, Guangxi steel group, Hebei steel group and Shandong steel group, and promote the inter-regional reconstruction of Anben steel, Panzhihua steel and Northeast steel, and that of Baosteel, Baotou steel and Ningbo steel, and promote the reconstruction of TPCO, Tian steel and Tianjin Metallurgy company, and that of Tai Steel and those steel enterprises in the province. It shall try to develop to several strongly competitive and super large steel enterprises, like Baosteel, Anben Group, and WISCO, with their production capacity more than 50 million MT, and several 10-30 million MT large steel enterprises.

(四) 加大技术改造力度, 推动技术进步。

5. Invgorate technology innovation and push ahead technical progress

实施钢铁产业技术进步与技术改造专项 (详见附表 1), 对符合国家产业政策的大型骨干企业, 对实施跨区域、跨所有制、跨行业重组的龙头企业, 以及国防军工、航天航空关键材料生产企业, 给予重点支持; 对发展高速铁路用钢、高磁感取向硅钢、高强度机械用钢等关键钢材品种, 推广高强度钢筋使用和节材技术, 发展高温高压干熄焦、烧结余热利用、烟气脱硫等循环经济和节能减排工艺技术, 以及提升开发利用低品位、难选冶铁矿等技术, 给予重点支持。

Implement steel industry technology progress and advancement (details in Appendix 1). For those large enterprises which are in compliance to national industrial policy, leading enterprises which implement multi-regional, trans-ownership and inter-industrial reconstruction, and key material manufacturing enterprises which are in relation to national defense, military, aerospace, and aviation, it shall give key support. For those developments of high-speed railway steel, high-magnetic oriented silicon steel, and high-strength mechanical steel, promotion of high-strength steel fixture and material reservation technology, development of circular economic and energy saving technology like high-temperature and high-pressure coke quenching, and heat utilization in sintering, and those technologies relating to enhancement of utilization of low-quality, hard-selection iron ores, it shall also give key support.

(五) 优化钢铁产业布局, 统筹协调发展。

5. Rationalize location of capacity in steel industry

在减少或不增加产能的前提下, 加快调整钢铁产业布局。一是建设沿海钢铁基地。按期完成首钢搬迁工程, 建成曹妃甸钢铁精品基地。结合广州钢铁搬迁, 推动宝钢与广东钢铁企业、武钢与广西钢铁企业兼并重组, 通过淘汰或减少现有产能, 适时建设湛江、防城港沿海钢铁精品基地。按照首钢在曹妃甸减少产能、发展循环经济的模式, 结合济钢、莱钢、青钢压缩产能和搬迁, 对山东省内钢铁企业实施重组和

淘汰落后产能, 推动日照钢铁精品基地建设。结合杭钢搬迁、以及宝钢跨地区重组和淘汰落后、压缩产能, 论证宁波钢铁续建项目。二是推进城市钢厂搬迁, 引导产业有序转移和集聚发展, 减少城市环境污染。组织实施好北京、广州、杭州、合肥等城市钢厂搬迁项目, 统筹研究推进抚顺、青岛、重庆、石家庄等城市钢厂搬迁。三是抓紧实施《汶川地震灾后重建生产力布局和产业调整专项规划》确定的钢铁项目建设。

Accelerate the adjustment of steel industry layout under the condition of decreasing or not-to-increasing capacity. First, build coastal steel base. The ShouGang relocation project shall be finished on time; the Caofeidian Steel quality base shall be finished. At the same time of Guangzhou Steel industry relocation, the merger and restructure between Bao Steel and Guangdong Steel enterprises and that between Wu Steel and Guangxi Steel enterprises shall be promoted. Through eliminating or decreasing the existing capacity, build Zhangjiang, Fangcheng port coastal steel quality base. According to the pattern of decreasing capacity, developing recycling economy which applied by Bao Steel in Caofeidian, with the integration of capacity decreasing and enterprises relocation of Ji Steel, Lai Steel, Qin Steel, carry out restructure of steel enterprises in Shandong province and eliminate backward capacity, and promote the construction of Rizhao Steel quality base. Combining the relocation of Hang Steel and the trans-regional restructure of Bao Steel and its backward capacity elimination and capacity decreasing, research the feasibility of Ninbo Steel's followed construction. Second, promote urban steel industry relocation, guide the ordered transfer and aggregated development of industries, and decrease urban environmental pollution. Organize and implement steel enterprises relocation in Beijing, Guangzhou, Hangzhou, Hefei and other cities, carry out overall research steel enterprises relocation in Fushun, Qingdao, Chongqin, Shijiazhuang and other cities. Third, implement steel projects construction established in *Specific Plan concerning Production Capacity Rebuilding and Industrial Adjustment after Wenchuan Earthquake*.

(六) 调整钢材品种结构, 提高产品质量。

6. Reshape product structure and raise product quality

重点发展高速铁路用钢、高强度轿车用钢、高档电力用钢和工模具钢、特殊大锻材等关键钢材品种, 支持有条件的企业、科研单位开展百万千瓦火电及核电用特厚钢板和高压锅炉管、25 万千瓦安以上变压器用高磁感低铁损取向硅钢等技术进行攻关。提高认证标准, 加强政策引导, 促进钢材实物质量达到国际先进水平。修改相关设计规范, 淘汰强度 335MPa 及以下热轧带肋钢筋, 加快推广使用强度 400MPa 及以上钢筋, 促进建筑钢材的升级换代。

Mainly develop the key steel products like high-speed railway steel, high-strength automotive steel, high-quality electric-use steel and mode-use steel, and special large forge materials, support the technology research and development of million KW level special thick steel for fire and nuclear electricity generating use, high-pressure boiler use pipe, technology of high magnetic strength and low iron losses silicon iron used in 250,000 KV transformer. Raise certificate standard and strengthen policy control to promote steel quality to reach advanced international level. Amend relevant designing

norm. eliminate hot rolled ribbed steel bars with intensity below 335 Mpa, quicken the use of steel bars with intensity over 400 Mpa, and promote the upgrading of construction-used steel bars.

(七) 保持进口铁矿石资源稳定，整顿市场秩序。

7. Stabilize import of iron ore, normalize the market order

行业协（商）会通过行业协调，加强自律，规范进口铁矿石市场秩序；探索、推行代理制。抓住当前市场全面疲软时机，协调国内用户与铁矿石供应商，建立互惠互利的进口矿定价机制和长期稳定的合作关系。规范钢材销售制度，建立产销风险共担机制，发挥流通环节对稳定钢材市场的调节功能。

Industrial association and chamber of commerce shall help to build market orders with more self-discipline. by seizing the recession of current market, coordinate domestic consumers and iron ore providers, and build import pricing mechanism and long-term stabilized partnership which benefits both parties. Build steel product sales system with risk-shared mechanism and exert the adjusting function of circulation channels to the steel market stabilization.

(八) 开发国内外两种资源，保障产业安全。

8. Safeguard industrial safety and develop two resources in domestic and foreign markets

加大国内铁矿资源的勘探力度，合理配置与开发国内铁矿资源，增加资源储备。鼓励大型钢铁企业开展铁矿勘探开发，适度开发利用低品位矿和尾矿，加强对共生矿、伴生矿产资源的研究、开发和综合利用。积极推进河北司家营、山西襄家村等大型铁矿资源开发，提高国产铁矿石自给率；支持邯钢中关、唐钢石人沟、通钢塔东、武钢恩施等现有矿山的深部开采，提高资源综合利用水平；鼓励四川攀西、河北承德地区钒钛资源综合利用；整合开发安徽宿丘地区和山东苍山等地区的铁矿资源。

Increase the level of iron ore exploitation, allocate and exploit domestic iron ore resources rationally, and increase resource reservation. Encourage large-sized steel enterprises to carry out iron ore exploitation, exploit and utilize low-grade ore and tailings, strengthen the research, development, and comprehensive utilization of intergrowth ores, associated ores. To actively promote the resource exploitation of large-sized iron ore in Sijiyin, Hebei Province and in Yuanjiacun, Shanxi Province, etc., and increase self-sufficiency degree of iron ores. Support the deep exploitation of ores in Handan Zhongguan, Tang Steel Shirengou, Tong Steel Tadong, Wu Steel Enshi, etc., increase comprehensive resource utilization degree, encourage comprehensive use resource use of vanadium and titanium in Panxi, Sichan province and Chengde, Hebei province, and integrate iron ores resources in Huoqiu, Anhui province and Cangshan, Shandong Province, etc.

鼓励有条件的大型企业到国外独资或合资办矿，组织实施好已经开展前期工作的境外矿产资源项目。鼓励沿海钢铁企业充分利用区位和运输优势，尽可能利用国外铁矿石、煤炭等资源。

Encourage large-sized enterprises with strengths to exploit ores abroad in joint-venture or in single proprietorship, and implement prior phase work of abroad ore resources projects. Encourage coastal steel enterprises to comprehensively utilize location advantages and transport advantages, and utilize iron ores, coal mines abroad as far as possible.

四、政策措施

IV. Policy Options

(一) 调整部分产品的进出口税率。

1. Reschedule import and export tariff duties

继续坚持控制“两高一资”低附加值产品出口的政策导向,认真落实提高部分钢铁产品出口退税率的措施,适时适当提高技术含量高、附加值高的钢材产品的出口退税率。加快出口退税进度,确保及时足额退税。

Continue on policy orientation of controlling export of “two high, one resource” and low value-added goods, realize implementation of raising rates of VAT refund for exported goods, and where appropriate and timely needed, raise rates of VAT refund for steel products featured with high technical content and high value-added. Speed up payment of VAT refund and ensure timely and adequate refunding.

(二) 实施公平贸易政策。

2. Policy for fair trade

研究国产钢材和进口钢材公平税负政策,制订具体措施,为国内钢铁企业创造公平竞争的市场环境。

Review the policy for taxation on equal footing of domestically-produced v. imported steel products and formulate specific measures to create a market with fair competition for all steel mills.

(九) 加大技术进步及技术改造投入

3. Increase inputs into technology progress and innovation

在中央预算内基本建设投资中列支专项资金,支持钢铁企业开展技术改造(不包括节能技术改造)、技术研发和技术引进,推动钢铁产业技术进步,调整品种结构,提升钢材质量。加大节能技术改造财政奖励支持力度,鼓励、引导钢铁企业积极推进节能技术改造。

Establish a special account in the infrastructure fund of the central government, and support technological innovation (on top of energy saving innovation), research and development of technology and purchase of technology by steel enterprises by means of interest grant (granting interests of loans) to promote technical progress, upgrade in product structure and improvement of quality in the steel industry.

(四) 完善落后产能退出机制。

(4) Improve the Exit Mechanism of Backward Capacity.

加大淘汰落后产能的财政奖励力度,支持钢铁企业在淘汰落后产能过程中妥善解决职工安置、企业转产、债务化解等问题,促进社会和谐稳定。严格实行节能减排、淘汰落后问责制,比照《国务院批转节能减排统计监测及考核实施方案和办法的通知》(国发〔2007〕36号)规定,对未完成节能减排、淘汰落后任务的地区暂停项目的核准和审批。工业和信息化部会同有关部门,加强对淘汰落后产能工作的监督检查,定期向国土资源、金融、环保、工商、质检等部门通报淘汰落后企业名单。地方各级人民政府要对限期淘汰的落后装备实施严格监管,防止擅自扩容改造或异地转移。对擅自扩容改造或异地转移落后装备的,金融机构不提供任何形式的信贷支持,国土资源管理部门不予办理用地手续。

To enhance financial incentive for dismantling backward production capacity, and facilitate the steel enterprises in question to softly dis-employ or re-employ workers, to assume production in new production lines, and to resolve debt burden problem on their own, so to enhance harmony and stability in the society. To severely enforce responsibility of saving energy, decreasing emissions and dismantling backward capacity, stop approving and/or filing for record of project from the areas (provinces/regions/counties) where the targets of energy saving, emissions decreasing and backward capacity dismantling have not been achieved.

(五) 完善企业重组政策。

5. Rationalize policy for reorganization

制定鼓励钢铁企业兼并重组的政策措施,妥善解决富余人员安置、企业资产划转、债务核定与处置、财税利益分配等问题,对大型企业跨省(区、市)重组后的改扩建等项目优先予以核准。落实好鼓励钢铁企业重组的税收政策。适时研究制定钢铁企业兼并重组条例。

Formulate measure to facilitate merger, acquisition and/or reorganization of steel mills, i.e. to make things more viable for enterprises in planning M&A and reorganization, such as relocate or resettle extra workers in other jobs, transfer or refer assets to some other entities out of original management scope, evaluate and settle the debts, and resolve issue of the fiscal interests therein. Prioritize in sequencing decision making on renewing or upgrading project by those enterprises out of interregional reorganization. To better implement the favorable taxation policy for reorganization among steel mills.

(六) 适时修订钢铁产业政策。

6. Timely revise the Steel Industry Policy

调整更新《产业结构调整指导目录》,修订完善《钢铁产业政策》。一是提高吨钢综合能耗、吨钢耗新水以及炼铁、炼钢淘汰落后标准;二是修改国内钢铁产业集中度指标的考核范围和比重;三是增加节能减排指标,包括化学需氧量(COD)排放、二氧化硫排放、烟粉尘排放、可燃气体回收利用率、固体废物综合利用率等环保指标;四是明确资源配置的具体要求,储量5000万吨以上铁矿资源,优先依法配置给国内大中型钢铁企业。五是提高矿产资源开发准入门槛。

Update the Catalog of Structural Adjustment of Industries, revise and improve the Steel Industry Policy. First, raise the guiding standards of overall energy consumption per metric ton steel, of consumption of new iron per metric ton of steel, and that of backward capacity of iron and steel mills; second, revise the scope and coverage percentage subject to overlooking of concentration ratio for domestic steel industry; third, add indicators reflecting energy saving and emission reduction; fourth, specify allocation or matching of iron ore resources, and prioritize those large and medium enterprises with efficient and clean capacity; fifth, raise the threshold for access to business in mining and resources development.

(七) 提高建筑工程用钢标准。

7. Raise the steel standards for constructions

尽快完善建筑领域工程建设标准体系, 结合提高抗震标准, 研究出扩大工业厂房、公共建筑、商业设施等建筑物钢结构使用比例的规定, 修改提高地震多发地区建筑物、重点工程、建筑物基础工程用钢标准及设计规范。

Speed up to rationalize the standard system for constructions, together with raising the criteria for earthquake resistance, formulate and publicize rules regarding to ratio of steel structure in constructions such as those used for plant, public utilities and commercial facilities, and revise and upgrade architecture norms and steel standards for base construction of buildings, for key construction project and for building in the areas with high frequency of earthquake.

(八) 实现钢铁与相关产业协调发展。

8. Realize balanced development of steel and related industries

完善装备、汽车、造船、家电等相关产业发展政策, 带动钢铁产品消费和产业升级。加强钢铁新技术、新产品研发, 适应和促进上下游及相关产业升级和产品换代。鼓励和支持钢铁企业与其他领域用钢企业开展合作, 实现协调发展。

Rationalize related policies for industries such as equipments, car-making, ship-building, and home electronics, and thereby enhance steel product consumption and industrial upgrading. Invigorate R&D of new steel technology and new steel products to adapt to the situation of progress and upgrading in the related upstream and downstream or other related industries. Encourage cooperation between steel and user enterprises.

(九) 继续实施有保有压的融资政策。

9. Continue policy of financing on disaggregate basis

加大对钢铁重点骨干企业的金融支持力度, 对符合环保、土地法律法规以及投资管理规定的企业, 以及实施并购、重组、走出去、技术进步的企业, 在发行股票、企业债券、公司债券、中期票据、短期融资券以及银行贷款、吸收私募股权投资等方面给予支持。防范大型骨干企业资金断链风险, 必要时给予贷款贴息支持。对违法违规建设、越权审批的项目和产能落后企业, 继续实施融资限制等措施。

Drive to support financially of key enterprises in steel industry, that are at the same time investing in compliance with laws and regulation in respect to environment, land usage, and investment reviewing, and by way of M&A, reorganization, going global and technological innovation, prioritize them in decision-making in regard to issuance of publicly traded shares, bonds, bank notes, and bank credit and using private equity investment. Provide interest grant for large enterprise using commercial credit loans when necessary to prevent them from severe breakdown in cash flows. Discriminate financially against those enterprises that are approved and/or build in violation of laws and regulations or those with backward capacity.

(十) 积极实施“走出去”战略。

10. Actively realize going global strategy

进一步简化项目审批程序, 完善信贷、外汇、财税、人员出入境等政策措施。提高境外资源开发企业准入条件。支持符合准入条件的重点骨干企业到境外开展资源勘探、开发、技术合作和对外并购。进一步加强境外资产的经营管理, 切实防范和化解境外资产风险。扩大冶金设备出口信贷规模, 带动设备物资出口, 完善出口信用保险政策, 支持钢铁企业建立境外营销网络, 稳定高端产品出口份额。充分利用境外矿产资源权益投资专项资金、对外经济技术合作专项资金和国外矿产资源风险勘探专项资金, 支持企业实施“走出去”战略, 增强资源保障能力。

Further streamline scrutiny procedure for project of going abroad, rationalize accordingly the measures in terms of credit, foreign exchange, fiscal and taxation and border control. Raise access criteria for going abroad of resource exploitation enterprises, and support those key eligible enterprises going abroad to do exploitation, development, technical cooperation and M&A. Further improve management of assets abroad to avoid and mitigate risks thereof. Increase scale of export credit for metallurgical equipments. Rationalize insurance policy of export credit. Encourage steel enterprises to establish marketing network abroad, and stabilize market share for high end products. Support enterprise to realize strategy of going global to enhance capacity of ensuring resource safety by making full use of various funds.

(十一) 建立产业信息披露制度。

11. Establish disclosure regime of industrial information

建立部门联合发布信息制度, 适时向社会发布产业政策导向及项目核准、生产销售库存、产能利用、淘汰落后、企业重组、污染排放、银行贷款情况等信息, 切实加强信息共享, 为企业投资决策、银行贷款、土地预审等提供信息指导。

Establish inter-department information release system, timely release information in regard to industrial policy orientation, project review, production, sales, inventory, capacity usage rate, dismantling backward capacity, reorganization, waste emission, and bank credit loans, etc., to substantially enhance sharing of information for purpose to provide information for decision-making in enterprise investment, bank credit and land transfer.

(十二) 发挥行业协(商)会作用。

12. Role of Chambers and Associations

充分发挥行业协(商)会的桥梁和纽带作用,支持企业联合对外谈判,由钢铁协会组织用矿企业统一对外谈判,建立新的双赢定价机制。由钢铁协会会同相关商会协调企业,积极应对国际贸易中的反补贴、反倾销诉讼,维护市场秩序和公平竞争环境。行业协(商)会要及时反映行业问题和企业诉求,为企业提供信息服务,引导企业落实国家产业政策,加强行业自律,提高行业整体素质。

Steel associations in conjunction with chambers concerned may coordinate enterprises to actively respond to anti-subsidy and antidumping investigations in relation to international trade, safeguard market order and fair competition environment. Associations and/or chambers may timely communicate difficulties and problems facing steel enterprises or the industry, serve enterprises with more information, and guide enterprises to comply with industrial policy of the state, and enhance self-disciplines and capacity-building of the industry as a whole.

五、规划实施

V. Implementation

各地区要按照《规划》确定的目标、任务和政策措施,结合当地实际抓紧制订具体落实方案,确保取得实效。各省(区、市)要将具体工作方案和实施过程中出现的新情况、新问题及时报送国家发展改革委。

Local entities may actively formulate their own blueprint to materialize the targets, achievements and policy options in this blueprint and adapt them into their own actual situations respectively. Local departments should communicate to NDRC respectively their own blueprint and the new problems and new horizons during the implementation of their own blueprint.

国务院各有关部门要按照《规划》分工,加强沟通协商,密切配合,尽快制定具体实施办法,明确政策措施的实施范围和执行期限,并加强指导和监督检查。有关部门要认真开展实施《规划》的中后期后评价工作,及时提出评价意见。

Relevant departments under the State Council should invigorate communication and consultation among themselves and closely coordinate with each other, and work out their own program to materialize the blueprint, including specific scope and timeline for policy measures, and also follow up with guidance and supervision thereupon. They should further evaluate the achievements and materialization of the blueprint, and make their evaluation available to department concerned.

附表: 钢铁产业技术进步与技术改造专项表

Appendix: Specific Form for the Steel Industrial Technology Advancement and Technology Reformation

附表：

Appendix：

钢铁产业技术进步与技术改造专项表

Specific Form for the Steel Industrial Technology Advancement and
Technology Reformation

类别 Category	专项内容 Specific Content	实施内容 Implementation Content
技术研发 专项 Technology Research	前沿技术和关键 产品生产技术 Cutting edge technology and key products manufacture technology	支持非高炉炼铁技术、连铸薄带技术、高效低成本纯净钢生产技术、大型板坯连铸技术、钢渣综合利用等关键共性技术研发和成果转化。重点支持百万千瓦火电及核电用特厚板和高压锅炉管、25万千瓦安以上变压器用高磁感低铁损取向硅钢等品种的生产技术。 Support the research and achievements conversion of key technologies as non blast furnace ironmaking technology, continuous casting slim bar technology, pure steel manufacture with efficiency and low cost, continuous casting for large plate blank manufacture, steel slag comprehensive utilization. Support technology research and development of million KW level special thick steel for fire and nuclear electricity generating use, high-pressure boiler use pipe, technology of high magnetic strength and low iron losses silicon iron used in 250,000 KV transformers
	自主集成重大装 备和首台首套设 备 Independent integrated major equipments and new equipments	千万吨级钢铁企业的设计、制造和系统耦合技术，热轧和冷轧宽带钢关键技术装备，重大装备国产化依托工程，首台首套设备。 The design of steel enterprises with 10 million ton level, manufacture and systematic coupling technique, key technical equipment for hot and cold roll of wide flat steel, major equipment project and new equipments.
	成熟应用技术的 推广 Promotion of mature and applied technology	高强度钢筋、汽车板、造船板等应用技术。 High intensity bar reinforcement, auto sheet, shipbuilding sheet and other applied technologies.
技术引进 专项 Technology import	高端产品生产技 术 High level product manufacture technology	高磁感取向硅钢、耐高温高压腐蚀电站用钢、高强度轿车板生产技术。 Manufacture technologies of silicon steel with high magnetic strength, generating plant steel with resistance for high-temperature, high-pressure and erosion.

类别 Category	专项内容 Specific Content	实施内容 Implementation Content
	清洁生产 and 循环经济工艺技术 Clean manufacture and recycling economic technologies	焦炉煤调湿、大型热电联产技术、海水淡化技术等。 coke oven moisture, large-sized combined heat and power generation technology, seawater desalination and other technologies.
技术改造 专项 Technology Innovation	关键钢材品种 Key steel product	重点发展高速铁路用钢、高牌号无取向硅钢、高磁感取向硅钢、高强度机械用钢、抗腐蚀抗大变形的管线钢、高强度轿车用钢、高档电力用钢、高强度建筑用钢、高档精密不锈钢薄板带、高档工模具钢、特殊大锻材、特殊质量要求的高级无缝钢管等。 Develop highway-used steel, non-oriented silicon steel with high grade, high magnetic strength oriented silicon steel, high-intensity mechanical steel, pipeline steels with erosion and transformation resistance, car-used steel with high density, quality electrical-used steel, mechanical-used steel with high intensity, quality precision stainless sheet steel, quality die steel, special forging material, quality seamless pipe with special quality requirement.
	高强度钢筋和节材 Steel bar and part material with high density	修改相关设计规范，加快淘汰强度 335MPa 热轧带肋钢筋。对地震多发地区的建筑物、建筑物基础工程、重点工程，强制使用强度 400MPa 以上钢筋。采用超细品粒或微合金化等工艺对建筑钢材产量较大的大中型企业生产线进行改造，促进建筑钢材的升级换代。 Amend related designing norm and quicken the elimination for Hot rolled ribbed steel bar with intensity of 335 Mpa. The building, infrastructure for building, key projects shall utilize steel bar with intensity of 400 MPa. Adopt ultra-fine grain or micro-alloying technique to reform the medium and large-sized enterprises which consumes large volumes of mechanical steels, to promote upgrading of mechanical steel.
	可循环工艺和节能减排 Recycling technology and energy-saving and emission-reduction	在现有大型骨干企业和国家核准的新建钢铁企业建设中推广高温高压干熄焦技术、烧结余热利用、烧结烟气脱硫、高炉工序系统工艺技术、高炉炉顶余压发电和干法除尘技术、转炉煤气干法除尘及回收利用技术、铸轧一体化技术及综合能源管理技术，鼓励沿海大厂采用风力发电。 Promote high temperature, high pressure and dry quenching technique, waste energy of exhausted fume, sintering gas desulphurization, blast-furnace system technique, blast-furnace rest pressure electricity generating, dried dust exclusion, converter gas dried dust exclusion and recycling, roll and forge all-in-one technique and comprehensive power management in the large-backbone enterprises and newly-established steel enterprises after approval, and encourage wind-generated electricity in the large coastal enterprises.

类别 Category	专项内容 Specific Content	实施内容 Implementation Content
	低品位难选冶矿产资源选冶 Smelting of low-grade ores	支持开发利用共生、低品位、难选冶的锡铁矿、高磷铁矿、菱铁矿等选冶技术，深部开采技术，鼓励钒钛、硼铁资源综合利用。 Support the exploitation technique of inter-grow, low grade limonite, high-phosphorus iron ore, siderite, deep exploitation technique. Encourage comprehensive use of Vanadium Titanium and ferroboron.
	焦化和辅料 Coking and accessories	支持焦化产品回收，铁合金、炭素和耐火材料等产品生产的先进节能减排技术开发和应用。 Support coked product recycle, the development and application of technique in energy-saving and emission-reduction of iron alloy, carbon and fire-resisting materials.
	信息化与自动化 Information and automation	支持自主开发钢铁生产工艺自动化控制技术和信息化管理技术。 Support independently-developed steel manufacture automation control and information management technique.